



ISIS HR Quick Tips

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Managing the Performance Planning & Review Rules in ISIS HR

How can updates to the Appraisal Infotype (IT 0025) and the ZP117: Appraisal Report assist agencies in monitoring timely planning sessions?

Per agency request, updates to Appraisals (IT0025) and the ZP117: Appraisal Report have been implemented in ISIS HR effective 12/08/2009. The Appraisal infotype will no longer have the 'Next Year Planning Complete' checkbox as an active selection. Agencies can enter the date the planning session was completed along with the planning session reason from a drop down menu of options.

For example, if an employee has his annual planning session on 1/6/10, enter 1/6/10 under 'Plan Date 1' and the reason selected would be 'Annual Planning Session.' In the event that the employee is detailed or has a significant change in duties that results in a new planning session, then the new planning session date can be entered into 'Plan Date 2' or 'Plan Date 3.' It is at the agency's discretion whether these fields are utilized or not and will not be a part of the Data Integrity review of records.

When reviewing the updated ZP117: Appraisals Report, planning sessions entered in ISIS HR prior to December 8, 2009, will still have an 'X' in the 'Plan Sess' field if the check box on the appraisal screen was checked. Those planning sessions entered in ISIS HR after December 8, 2009, however, will have the planning completion date listed under the 'PlanDate1' column and the planning session reason listed under the 'PlanDate1Reasons' column.

Additional information on maintaining the Appraisals infotype can be found in the [ISIS Help Script](#) on maintaining appraisals and [ISIS HR Quick Tip #39](#) on management of the changes to the PPR rules.